



**Delaware Valley
Family Business Center**
Helping Business Families Thrive

FAMILY BUSINESS FORUMS:

Educational, interactive seminars designed for family firms where several generations of family members and non-family key executives learn “best practices” from each other and from business experts. Membership exceeds 80 family firms and includes:

- ◆ **Initial Family Meeting Orientation**
- ◆ *Primer for Business Families*
- ◆ Estate Planning Fire Drill
- ◆ Financial Scorecard
- ◆ Philanthropy Review
- ◆ Cash Management Evaluation
- ◆ Corporate Risk Audit
- ◆ Employee Benefits Benchmarking
(complete listing on the other side)

NEXT GENERATION LEARNING LABS:

Peer groups providing a proven **fast-track learning environment for successors**. Experienced facilitators guide the development of successors from non-competing businesses through **executive coaching, peer processing of real issues, and input from experts**.

CONSULTING:

Customized coaching and individualized assessments. Our **Family Business Strategic Planning Process** helps to strengthen family relationships while enhancing business performance in this generation and the next. Engagements may include Family Meeting Facilitation, Executive Team Development, Board Development; Successor Development, Compensation/Incentive Programs, and Succession Planning.

Invitation to an Evening Family Business Forum at Shannondell at Valley Forge!

Wednesday Evening, November 15, 2006

5:15 p.m. **Dinner & Tour;** 7:00 p.m. **Program**

A “Sweet” Evening with the Hawk Family



The Passion, Power & Perils of Sibling Teams

Join us for our annual evening dinner meeting to learn from the Hawk Family, members of the Family Business Forum since 2004. Learn how this 3rd generation (G3) moving to G4 business has evolved over the years and how they are planning for the next generation of ownership and management.



Founded in 1936, **Gertrude Hawk Chocolates** employs over 1,000 people and has grown into a

The Hawk Family, Gertrude Hawk Chocolates, Dunmore, PA
From left to right: Pat Hawk, Chris & Jen Tarrach, Joe & Carolyn Horter, Paul Hawk, Ann & David Hawk

\$90 million annual business with multiple divisions: Retail, Ingredient Inclusions, Retail, Ingredient Inclusions, Fundraising, Contract Manufacturing, and Wholesale. Many of you have tasted their fine chocolate! Members of the Hawk family will share their mission, vision, values, development plans, and their family business planning process.

As has become our custom, we’re pleased this dinner meeting will be hosted by a Forum member, the Neilson family, at one of their brand new, elegant retirement communities, **Shannondell at Valley Forge** in Audubon, PA!

Shannondell The evening includes delicious
AT VALLEY FORGE hors d’oeuvres, dinner and
America’s Best New Retirement Lifestyle. dessert, a brief tour of
Shannondell’s newest facility, culminating with the program
in their state-of-the-art Theatre.

The design of your evening Forums, which includes an introduction to a business, a family and a facility is a great vehicle to introduce the incoming generation. It provides a safe, networking environment for them to observe and explore. Also, it’s a great opportunity to mentor them into the world of business—family style!

*Carol Buchen
B. R. Kreider & Son, Inc.
Manheim, PA*

REGISTER EARLY ... SEATING IS LIMITED!

FORUM PARTNERS: Hamburg, Rubin, MMA Trust Kreischer Key Advisors National Penn Bank O’Neill Commerce Insurance
Mullin, Maxwell & Lupin & Foundation Miller Group Member FDIC Employee Benefits Services

For more information, call Sally Derstine at Delaware Valley Family Business Center, (215) 723-8413.
1011 Cathill Road, Sellersville, PA 18960 ☎ sally@dvfambus.com ☎ www.dvfambus.com

Forum Membership Application & Registration Form



Take advantage of your Member Benefits!

An Initial Family Meeting Orientation. A confidential session with your family to clarify your objectives and introduce resources to help prepare your business family for another generation of success.

Primer for Business Families. A practical, how-to introductory booklet which provides a roadmap to help business families meet together to develop their OWN family business policies and plans.

Quarterly Forum Meetings. Learn from successful business families and experienced family business advisors. Member companies receive one FREE registration to EACH Forum.

Next-Generation Learning Labs. Forum companies are eligible for admission to a Next-Generation Learning Lab—facilitated successor peer groups which fast-track the growth and development of the next generation.

Family Business Magazine. Written exclusively for the owners and managers of family companies focusing on the tough issues virtually all business families must face. 25% subscription discount.

Family Business Advisor Newsletter. Complimentary 3-month subscription.

Membership Directory which facilitates member-to-member interaction and learning about family business issues.

**SUCCESS IS
NOT AN ACCIDENT ...
SUCCESS FOR BUSINESS
FAMILIES IS A CHOICE!**

Membership also includes these complimentary services from our Forum Partners:

Estate Planning Fire Drill. A quick, concise process designed to identify and resolve problems associated with your untimely death, culminating in a valuable written report (*Jon Samel, Hamburg, Rubin, Mullin, Maxwell & Lupin; Chuck Creighton, Key Advisors Group*).

Financial Scorecard. A complete diagnostic review of your firm's important financial and operational indicators (*Mario Vicari, Kreisler Miller*).

Philanthropy Review. A quick review to determine if your legacy plan adequately reflects your values and desires (*Bill Hartman, Mennonite Foundation & MMA Trust Co.*).

Cash Management Evaluation. A review of your firm's current cash management program and follow-up recommendations which include pricing discounts available exclusively to Forum Members (*Ray Abbott, National Penn Bank*).

Corporate Risk Audit. A review of your property & casualty insurance program (*Mike Tiagwad, Commerce Insurance Services*).

Employee Benefits Benchmarking. An assessment of your current employee benefits program (*John O'Neill, O'Neill Employee Benefits*).

New Member Application. Thanks to the generous support of our Partners, the annual membership fee is \$975.

Forum Registrations: I/we would like to register for the following Forum events:

Wed., November 15, 2006 "The Passion, Power & Perils of Sibling Teams"

Name(s) _____

Business Name _____

Address _____ City _____ State _____ Zip _____

Phone _____ Fax _____ E-mail _____ Website _____

Total Member Registrations _____ x \$75 (less one FREE at each event) = \$ _____

Please make check payable to:

Delaware Valley Family Business Center, 1011 Cathill Road, Sellersville, PA 18960 USA

If NEW Member, \$975 = \$ _____

TOTAL = \$ _____

Non-members may attend once with a guest registration of \$100.

Questions? Phone: (215) 723-8413 Fax: (215) 723-8351 E-mail: sally@dvfambus.com

Cancellations must be made 2 days prior to event. The registration fee cannot be refunded or waived when cancellations are made after that date or when the registrant does not attend.